

Chapter 4: Tourism Strategy for 2008-2012

Montana Tourism and Recreation Charter

At the June 2007 Montana Tourism Advisory Council (TAC) meeting, participants learned about the Crown of the Continent Geotourism MapGuide project involving Waterton-Glacier International Peace Park, National Geographic Society, and the surrounding communities. The project targets geotourists as a key traveler market. A discussion ensued about adoption of geotourism principles as part of this Strategic Plan, and possible development of a Montana Tourism and Recreation Charter. A draft Charter was developed by a Tourism Advisory Council committee. The draft Charter was discussed, refined, and adopted by the TAC at their October 2007 meeting in Lewistown.

Vision for Tourism and Recreation by 2012

The purpose of this Strategic Plan is to determine Montanans' desire for what tourism should become by 2012, and identify a path to get there. A vision is a description of a desired future – and it should be visionary. Below are the elements of the vision for tourism in Montana in 2012. This vision was developed by Montanans during public workshops held around the state in fall 2006.

It is the year 2012. Tourism and recreation in Montana have achieved the following...

Balance. Tourism and recreation revenues continue to increase year-round. Montana's unique character and sense of place are retained while providing quality experiences for both residents and nonresident visitors. Montana's rich natural, historic and cultural assets are managed for sustainable levels of visitation in a manner consistent with responsible, shared use. Communities that desire tourism are benefiting from new revenue and jobs, while retaining their community integrity and heritage. Montana is known for its diverse high quality natural, historic, and cultural tourism and recreation experiences, wide open spaces, abundant wildlife, and the friendly professionalism of its people.

Cooperation. Effective public-private-nonprofit-tribal partnerships are engaged in visionary, collaborative planning and implementation efforts which foster economic growth and stability, while respecting the values of Montanans. The private sector, community development organizations, supporting public agencies, and the nonprofit sector are working as a team, tapping limited resources more effectively through collaborative efforts.

Support. Sufficient financial and technical assistance is available from various sources to support effective tourism marketing and research, management of natural, historic, and cultural assets, and business development. Tourism is integrated into Montana's education and workforce training systems. An adequate workforce is available to support the tourism and recreation industry, and there is affordable housing for the workforce. Stable funding sources that do not diminish tourism marketing funds are available to develop and maintain infrastructure for tourism and recreation needs.

Respect. Tourism is recognized as an essential element of Montana's economy. It is appreciated by Montana citizens, elected officials, and federal/state land management agency officials for its financial and social contributions to the state. Cities have been provided tools to cover the costs of impacts from tourism. Lasting legacies from major historical and cultural events such as the Lewis & Clark Bicentennial and the National Folk Festival in Butte continue to benefit Montana residents and provide ongoing opportunities for businesses and visitors.

Accountability. A comprehensive evaluation system is being used to measure the success and impacts of tourism and recreation development and marketing, consistent with the strategic goals. Information about visitation trends, impacts, and visitor research are widely distributed to provide businesses and agencies facts needed to make good management decisions, and to be responsive to changing customer tastes and preferences.



Montana Tourism and Recreation Charter

The following Montana Tourism and Recreation Charter was written by the Montana Tourism Advisory Council (TAC), and adopted in October 2007. During the Strategic Plan timeline the Charter will be circulated for acceptance and adoption by Montana's tourism and recreation partners and stakeholders.

Montana Tourism and Recreation Charter

Whereas the travel and recreation industry of Montana recognizes our greatest asset in today's marketplace is Montana's great outdoors and pristine environment, including the headwaters of the continent, scenic vistas, wide open spaces, and abundant and charismatic wildlife;

And whereas our exceptional outdoor places are enhanced by equally distinctive communities, with a rich history of friendliness, authenticity, artistic traditions, and a people who derive their solid intellectual and creative capital from Montana's strong sense of place;

And whereas the people of the twelve tribal nations of Montana sustain an enduring cultural heritage and land ethic and provide opportunities for distinctive, enriching and educational experiences for visitors, particularly through culturally appropriate tourism businesses owned by American Indians;

And whereas we understand that Montana's collective authentic character represents values that are increasingly in demand by the economically and socially desirable "geotourist" market, travelers who share many common values with Montanans, including a desire to maintain the unique and authentic character of places;

And whereas the greatest long-term economic advantage for Montana's travel and recreation industry lies with the geotourism market and other visitors who share the respect that Montana residents and communities have for our natural and cultural assets;

And whereas we have observed that despite increasing market demand, there are ever fewer places in North America that have retained their authentic feel and sense of place as they are "discovered" and changed;

And whereas the Montana character won't be maintained through benign neglect, but rather requires shared commitment and constant vigilance;

Therefore, the State of Montana, the Montana State Tribal Economic Development Commission, and Montana's travel and recreation industry adopt this charter of stewardship and commitment to community-based economic development, promotion, and preservation of the unique and treasured Montana character.

From this point forward, we resolve to advocate, forge partnerships, and take individual and collective actions to guarantee that the authentic and highly valued Montana experience is available for future generations of residents and visitors.

(continued next page)

Geotourism

Geotourism is "tourism that sustains or enhances the geographical character of the place being visited - its environment, culture, aesthetics, heritage, and the well being of its residents." National Geographic and the Travel Industry Association of America have identified 55-65 million Americans who are geotourists.

Geotourism emphasizes the distinctiveness of its locale, beneficial to visitor and resident alike.

Principles of Geotourism

Community involvement: Base tourism on community resources to the extent possible, encouraging local small businesses and civic groups to build partnerships to promote and provide a distinctive, honest visitor experience and market their locales effectively.

Community benefit: Encourage micro to medium-size enterprises and tourism business strategies that emphasize economic and social benefits to involved communities, especially poverty alleviation, with clear communication of the destination stewardship policies required to maintain those benefits.

Protection and enhancement of destination appeal: Encourage businesses to sustain natural habitats, heritage sites, aesthetic appeal and local culture. Prevent degradation by keeping volumes of tourists within maximum acceptable limits. Seek business models that can operate profitably within those limits.

Land use: Anticipate development pressures and apply techniques to prevent undesired overdevelopment and degradation.

Evaluation: Establish an evaluation process to be conducted on a regular basis by an independent panel representing all stakeholder interests, and publicize evaluation results.

Source: National Geographic Center for Sustainable Destinations

We adopt the following Principles and associated courses of Action:

- 1) **Maintain integrity of place and destination appeal.**
 - a. Encourage businesses to sustain natural habitats, aesthetic appeal, and local culture.
 - b. Enhance geographical character through developments and improvements that are distinctive to the locale, consistent with local tradition, and reflective of its natural and cultural heritage.
 - c. Encourage tourism business strategies that emphasize long-term economic and social benefits to communities. Strive to use the local workforce, products, supplies, and services in travel businesses, thus benefiting residents economically.
- 2) **Promote and highlight the businesses, services, and opportunities that are unique to Montana.**
 - a. Base tourism on community resources, encouraging local small businesses and civic groups to build partnerships to promote and provide a distinctive, authentic visitor experience and market their locales effectively.
 - b. Encourage development of culturally appropriate businesses owned by American Indians.
 - c. Encourage small-to-medium-size enterprises and tourism business strategies that emphasize economic and social benefits to communities.
 - d. Create a linkage between locally grown agricultural products and tourism businesses.
- 3) **Promote sustainable resource conservation, including conservation of energy, water, wildlife, and compatible land uses.**
 - a. Environmentally aware travelers favor businesses that minimize pollution, waste, energy consumption, water usage, landscaping chemicals, visual blight, and unnecessary lighting. Encourage businesses to reduce pollution and energy consumption.
 - b. Showcase tourism businesses that practice resource conservation, earning Montana a reputation for environmental forward-thinking.
 - c. Sustainable tourism anticipates development pressures and applies management techniques and limits that ultimately sustain and respect natural habitats, scenic appeal, traditional use, and local quality of life.
- 4) **Participate in and help lead community stewardship partnerships to maintain Montana assets.**
 - a. Work with partner organizations to coordinate with the private sector to fund the preservation of open space.
 - b. Encourage appropriate land use methods that are sensitive to the unique natural character of Montana.
 - c. Anticipate development pressures and take action, in keeping with community values, to prevent overdevelopment and degradation.
- 5) **Identify and appeal to markets that value and seek to help sustain Montana's distinct character.**
 - a. Create a Montana Brand that resonates with the highly desirable geotourist.
 - b. Perform ongoing research to identify appropriate markets.
 - c. Design marketing to reach, educate, and recruit geotourism markets identified through research.
 - d. Encourage growth in tourism market segments most likely to appreciate, respect, and disseminate information about the distinctive assets of the locale.
- 6) **Foster a diversity of products and services that meet the demand of a demographic cross-section of the geotourist market.**
 - a. Encourage residents to boast of the natural and cultural heritage of their communities, so that tourists gain a richer experience and residents develop pride in their locales. All the elements of geographical character create a synergistic tourist experience that is richer than the sum of its parts, appealing to visitors with diverse interests.
 - b. Inform Montana communities and educate schools on how to use geotourism to nurture the natural history, culinary attractions, artisans, and performing arts of their areas.
 - c. Promote the unique qualities of communities in order to appeal to the entire demographic spectrum of the geotourism market and maximize economic resiliency.
- 7) **Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism.**
 - a. Conduct media and other outreach to educate Montanans about the elements of this Charter.
 - b. Build partnerships with other Montana groups which share our commitment to sustaining the special character of Montana and promoting community-based economic development.
 - c. Coordinate with school systems to educate students about the tourism industry and its role in the Montana economy.
 - d. Work with diverse partners, private and public, to advocate strategies and policies that sustain Montana's special character.
- 8) **Work with ITRR, Travel Montana, and other tourism organizations throughout the state to evaluate effective implementation of the Tourism Charter.**
 - a. Test marketing campaigns for effectiveness in reaching target geotourism markets.
 - b. Perform ongoing research to gauge attitudes and expectations of visitors to Montana.
 - c. Measure geotourism-related trends such as number of locally-owned tourism businesses, investments in rehabilitation and preservation of downtowns, and traveler spending on geotourist-oriented products, services and attractions among other trends.
 - d. Make adjustments to promotion and product development as necessary.

Guiding Principles for Tourism and Recreation Development

As reflected in the Charter on the previous pages, Montana businesses, citizens, and stake-holder groups who participated in the strategic planning process expressed that tourism in Montana should be a high quality experience which respects and celebrates Montana's unique heritage and character. They also want tourism to be sustainable: tourism should contribute to the economy without sacrificing long-term benefits for short-term profits. Tourists should not degrade the state's extraordinary natural, historic, and cultural assets.

Therefore, the Montana Tourism & Recreation Strategic Plan is guided by the following six principles. These guiding principles reflect the values expressed by Montana citizens in the public meetings, online survey, and other outreach efforts conducted by the planning team. They are the criteria against which tourism and recreation actions are evaluated and prioritized. In brief, all programming and actions should adhere to these guiding principles.

- ◆ Serve the needs of Montanans first: retain Montana's character, sense of place and assets while providing economic benefits for citizens and businesses.
- ◆ Manage for sustainable, high-quality visitor experiences: practice good stewardship.
- ◆ Maximize economic and social benefits by targeting high-value, low impact visitors.¹
- ◆ Retain local control of, and encourage public participation in, decision-making about the types and quantities of tourism development and visitors.
- ◆ Respect diverse needs, perspectives, and concerns in tourism planning and promotion.
- ◆ Collaborate to resolve issues through positive, inclusive, solutions-based processes.



¹ "High-value, low-impact visitors" are defined as visitors who contribute to Montana's economic and social prosperity while respecting and appreciating Montana's authentic natural and cultural assets.

Goals for Tourism and Recreation 2008-2012

The following are the goals for Montana tourism and recreation from 2008 to 2012, toward which action will be focused to attain the vision. The goals are based on top priority issues and opportunities identified by Montanans during public meetings and a statewide online survey.

- Goal 1:** Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low-impact visitors.
- Goal 2:** Attain public policy and citizen support for sustainable tourism and recreation.
- Goal 3:** Address management and access issues for sustainable tourism and recreation on state and federal lands.
- Goal 4:** Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.).
- Goal 5:** Support appropriate business growth, including new tourism products and services for target customer markets.
- Goal 6:** Address tourism and recreation professional development, workforce availability, and affordable housing issues.
- Goal 7:** Improve Montana's transportation system for both residents and visitors.
- Goal 8:** Enhance the "curb appeal" of Montana communities to attract visitors.
- Goal 9:** Enhance funding to maintain sustainable tourism and recreation in Montana.
- Goal 10:** Build an effective "team" to implement the Strategic Plan, and report results.

"High-value, low-impact visitors" are defined as visitors who contribute to Montana's economic and social prosperity while respecting and appreciating Montana's authentic natural and cultural assets.



Tangible Outcomes: Measurable Objectives

The following are statewide objectives for Montana tourism and recreation from 2008 to 2012, against which progress will be measured. The objectives are based on recent tourism and economic trends, and are designed to “raise the bar,” yet be achievable. However, if major unforeseen economic, security, or environmental events occur that dramatically affect the tourism industry, these objectives will be adjusted accordingly.



- ◆ Increase lodging tax collections statewide by at least 6% per year, from \$16.1 million in 2006 to \$22.8 million in 2012, emphasizing off-peak seasons.
- ◆ Build by 15% nonresident visitation in off-peak seasons by 2012.
- ◆ Increase nonresident traveler expenditures by 20%, from \$2.914 billion in 2006 to \$3.497 billion by 2012.
- ◆ Increase amount spent per day by nonresidents in Montana by 10%, from \$149 in 2006 to \$164 by 2012.
- ◆ Boost to at least 40% the portion of all nonresident travelers who are destination vacation travelers by 2010 (up from 34% in 2005).
- ◆ Raise state and local tax revenue generated by visitor spending by 4% per year.
- ◆ Improve statewide hotel occupancy rate from 59.5% in 2006 to at least 63% in 2012, as reported by Smith Travel Research, maintaining summer occupancy while focusing on growth in off-peak seasons.
- ◆ Boost average daily rate (ADR) in Montana hotels from 71% of U.S. average to 75% of U.S. average, estimated from \$68 in 2006 to \$82 by 2012, as reported by Smith Travel Research (national average in 2006 was \$96).
- ◆ Increase the number of new tourism and recreation-related jobs in Montana by 2% per year.
- ◆ Augment direct income generated by tourism and recreation by 7% per year.

Additional measurable objectives for each tourism goal are listed in Chapter 5.

Promotion, Product and Partnerships

To accomplish the ten goals and objectives, specific actions have been identified for each goal (see list of actions beginning on page 40). The actions were determined by input from the statewide public workshops, interviews with tourism and recreation industry stakeholders, the online survey, and other outreach by the planning team. The actions can be grouped into three categories: Promotion, Product, and Partnerships.

Promotion includes advertising, publicity, and other promotion activities targeting nonresident travelers, as well as awareness-building efforts targeting Montana residents and elected officials.

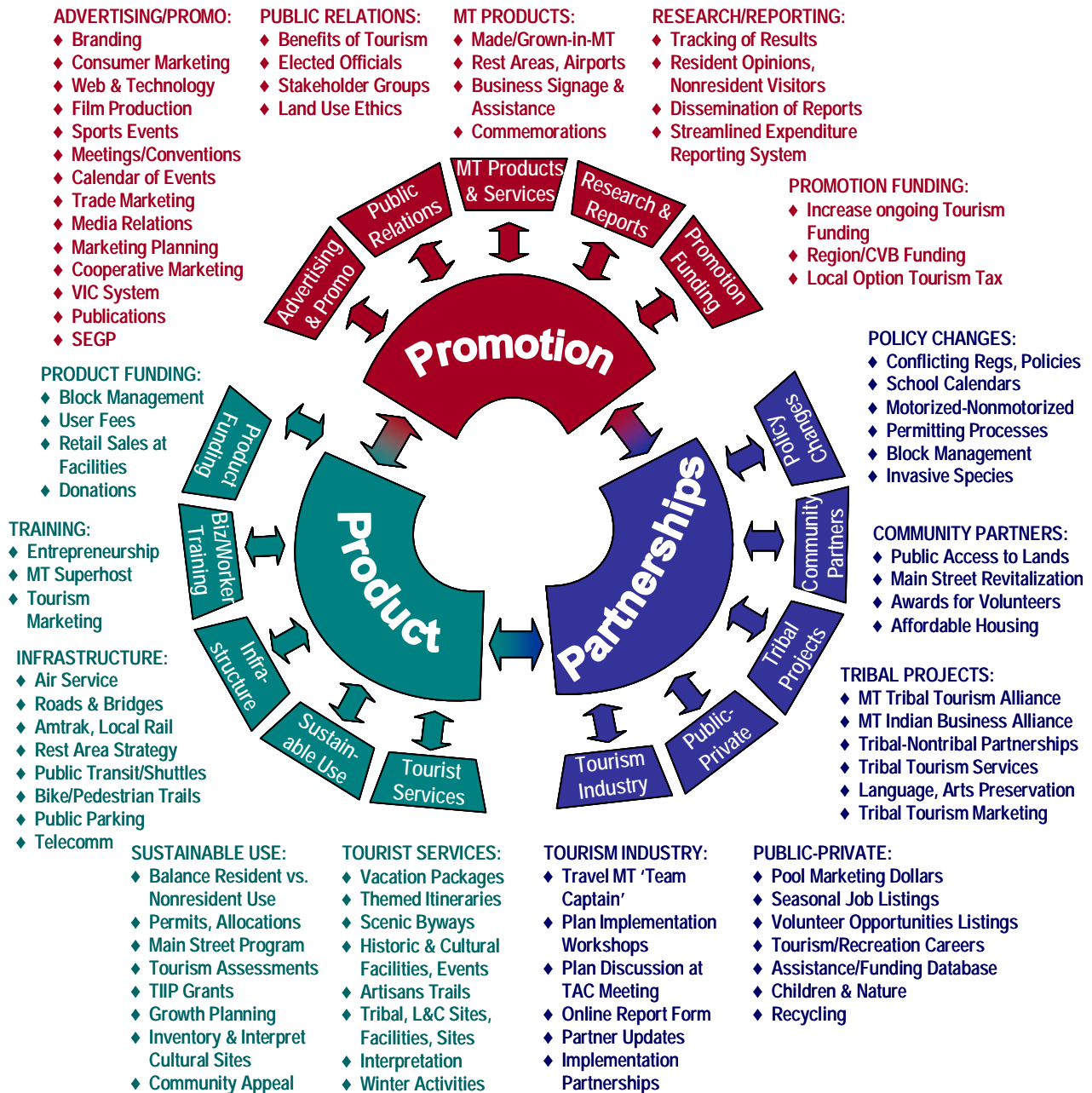
Product refers to the natural, cultural, tribal, and historic assets of Montana that travelers wish to experience, along with the facilities and services provided by Montana’s tourism and recreation businesses, tribes, and agencies.

Partnerships are essential to implementation of the Strategic Plan, by leveraging resources, changing policies and procedures to increase effectiveness, and addressing challenges faced by the tourism and recreation industry.

The graphic on the next page summarizes the key action areas and specific actions in each category.

Strategic Framework

The Strategic Framework for the tourism plan consists of three main elements: Promotion, Product, and Partnerships. The graphic below shows five key themes within each element and an overview of the actions within each theme. The three elements of the framework are inter-related, in that without products, there would be nothing to promote; without promotion, there would be no tourism development; and without partnerships, there would be no efficiency in promotion or product development.



Summary of Actions to Achieve Goals

Below are listed the ten goals and actions to achieve each goal in the Strategic Plan. Detailed descriptions of each action, along with priority, responsible partner, and measurable objectives, are listed in Chapter 5.

Goal 1: Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low-impact visitors.

- 1.1 Implement highly targeted consumer advertising and promotion campaigns, based on strategic marketing plans, and track/report results.
- 1.2 Promote Montana to targeted groups and events, emphasizing off-peak season.
- 1.3 Work collaboratively with other tourism marketing partners to plan and implement priority marketing efforts.
- 1.4 Improve Montana's Visitor Information System to extend visitor stays and spending.

Goal 2: Attain public policy and citizen support for sustainable tourism and recreation.

- 2.1 Build awareness through statewide publicity efforts about the Montana Tourism Charter, geotourism, tourism benefits/impacts, tourism and recreation partner initiatives, and allocation of lodging facility use tax.
- 2.2 Provide concise, visual briefings and presentations to policy makers and business groups about Montana tourism issues and benefits.
- 2.3 Change the state law and rules to allow broader eligibility for the Montana Scenic-Historic Byways program (and access to federal funding for byways).
- 2.4 Address ongoing and emerging tourism and recreation policy issues through collaborative efforts between policy-makers, agencies, businesses, non-profit organizations, tribes, etc.

Goal 3: Address management and access issues for sustainable recreation on private, state, and federal lands.

- 3.1 Educate visitors, suppliers, and residents about ethics and responsibilities on public and private lands, and use technology to encourage recreation in appropriate areas.
- 3.2 Coordinate state, regional, and local tourism marketing efforts with state/federal land management strategies to ensure that promotion messages are consistent with public land uses and available sites.
- 3.3 Support use of easements, county planning commissions, and agency planning efforts to maintain and improve public access to public recreation lands.
- 3.4 Continue to enhance the Montana Block Management Program, expanding public access to private lands.
- 3.5 Identify actions and initiatives to reconnect families and youth with the outdoors, and identify ways to link outdoor programs with statewide science, math, and language curriculum standards and initiatives.

Goal 4: Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.).

- 4.1 Promote Montana's existing historic and cultural assets for the enjoyment of residents and visitors.
- 4.2 Improve and maintain infrastructure, facilities, and services to support heritage and cultural tourism in Montana.
- 4.3 Continue efforts to preserve Montana tribal culture (stories, language preservation, cultural preservation workshops, tribal museums/interpretive centers, tribal arts).

Montana's ten tourism goals (page 37) are derived from key issues and opportunities identified by Montana citizens, businesses, and other tourism and recreation partners during statewide public workshops and surveys. The goals provide the framework for turning the tourism vision into reality by 2012. To achieve each of the goals, specific actions were developed, along with lead responsibility, partners, priority level, and timeline for each action. The actions are listed on this page and the next in summary form.

Chapter 5 provides detailed descriptions of each action, including priority level and responsible partners to lead and assist with implementation. A table summarizing the actions with their priority level, timeline, and responsible parties is included in Chapter 6. Appendices B-M contain lists of the actions organized by the partner group sectors.



Goal 5: Support appropriate tourism business growth, including new tourism products and services, for target customer markets.

- 5.1 Cultivate opportunities to leverage private and public dollars to create tourism products and attract new tourist markets.
- 5.2 Provide information about technical and financial assistance available to tourism and recreation businesses.

Goal 6: Address tourism and recreation professional development, workforce availability, and affordable housing issues.

- 6.1 Enhance professional development opportunities and requirements for staff and board members of Montana tourism and recreation-related organizations.
- 6.2 Improve systems to augment Montana's seasonal workforce for tourism and recreation.
- 6.3 Encourage use of local development incentives and federal funds for construction of affordable workforce housing.

Goal 7: Improve Montana's transportation system for both residents and visitors.

- 7.1 Increase air service capacity to and from Montana cities.
- 7.2 Continue to implement Montana's rest area strategy.
- 7.3 Improve and maintain Montana roads and bridges.
- 7.4 Increase use of passenger rail and transit service in Montana.
- 7.5 Expand bike/pedestrian trail systems in and between Montana communities, and connections to trailheads on state/federal lands.
- 7.6 Develop a user-friendly handbook to provide information about the highway signing process to businesses, attractions, and other tourism-related groups, including the use of international symbols (symbol signs).

Goal 8: Enhance the "curb appeal" of Montana communities to attract visitors.

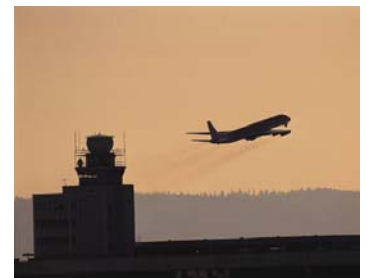
- 8.1 Increase the capacity of Montana communities to be more competitive in tourism.
- 8.2 Implement improvements to make Montana communities more visitor-friendly.

Goal 9: Increase funding to maintain sustainable tourism and recreation.

- 9.1 Seek increases in state funding sources for targeted tourism marketing and for tourism-and recreation-related programs and facilities.
- 9.2 Foster opportunities to pool public and private marketing dollars.
- 9.3 Enhance funding for region and CVB marketing efforts.
- 9.4 Provide technical assistance and resources to bolster the capacity of local arts and historical organizations and facilities, to help them increase funding for programming, maintenance, and operations.

Goal 10: Build an effective "team" to implement the Strategic Plan, and report results.

- 10.1 Recognize Travel Montana as the "Team Captain" to communicate regularly with partners, and coordinate successful implementation of the Strategic Plan.
- 10.2 Create public/private/tribal partnerships for cooperative project implementation.
- 10.3 Implement regular Strategic Plan discussion and reporting mechanisms in a variety of venues to ensure that actual tourism and recreation activities are aligned with Strategic Plan goals and actions.
- 10.4 Streamline the process of reporting marketing plans, projects, and expenditures to the TAC and Travel Montana by tourism regions and CVBs.
- 10.5 Obtain strategic research to inform tourism marketing, development, and policy decisions, and disseminate results and implications.



Tourism and Recreation Policy Issues of Note

This Tourism and Recreation Strategic Plan identifies ten goals, and specific actions to achieve each goal, to improve sustainable and responsible year-round tourism in Montana over the next five years. During the planning process, Montanans and the tourism industry identified ongoing and emerging policy issues of concern. These issues are multi-jurisdictional and require state/federal policy or regulatory action. They are too broad to address with a single action in the Strategic Plan. Therefore, they are highlighted in this section as topics for focused discussion, supported by resources of staff and funding, to develop statewide coordinated solutions. In some cases, the issues need attention at the federal level through agency channels, Congress, or organizations like the Western States Tourism Policy Council (www.dced.state.ak.us/wstpc).



Top Priorities regarding Management of Montana Lands and Facilities

1. Rivers and lakes
2. Access to public lands
3. State fishing access sites
4. State parks
5. Local historic or cultural sites/facilities
6. State-owned historical sites/facilities
7. Block management program
8. City/County-owned parks and recreation facilities

Source: Tourism Industry Survey, March 2007

The policy discussion process is led by state and federal officials: Governor, state agency directors, legislators, congressional delegation, and federal agency directors. These leaders determine the approach to policy issues, and identify implementation partners. The Montana Tourism & Recreation Initiative (MTRI) is an existing group of Montana state and federal agency directors chartered to work collaboratively on tourism and recreation policy issues and projects. MTRI includes representatives from the Governor's office, Tourism Advisory Council, state and federal agency directors, and agency staff. The MTRI directors' group is uniquely positioned to coordinate efforts among agencies to focus on policy issues, and identify strategic processes and solutions to resolve them. Businesses, property owners, community and tribal leaders, and nonprofit organizations need to participate in public discussions and management planning processes to demonstrate the interrelated nature of tourism on Montana's economy and its resource rich heritage. The ten issues listed below are not in order of priority.

POLICY ISSUE 1: Balancing resident and nonresident recreation use in land management decisions.

Montanans value their outdoor recreation and sportsmen's heritage. As nonresident visitation has increased, many Montanans feel that visitors encroach on their quality of life in some areas of the state at certain times of year. The entire tourism industry must be sensitive to this issue, and participate in policy discussions and agency planning processes, so that marketing efforts can be adjusted to maintain a balance between tourism impacts and local quality of life. Policy-makers need to identify locations where balance is a concern, and support local solutions to resolve conflicts.

Tourism and recreation impacts must be monitored with improved visitor data collection, which then can be reported to all partners so that management and marketing activities can be refined accordingly. An example of this issue is loss of hunting access for Montanans on private land to nonresident lessees. Changes to the block management program were suggested as a way to address this issue.

Conversely, early fall closures of facilities at Glacier and Yellowstone National Parks reduce opportunities for both residents and visitors to enjoy the glorious fall weather and wildlife viewing in the parks, and cause significant economic loss in gateway communities. Infrastructure upgrades are needed at Glacier National Park to extend the fall season beyond mid-September, when many baby boomers and geotourists are traveling.

POLICY ISSUE 2: Managing natural, cultural, tribal, and historic resources on public and private lands.

Resource managers and industry partners must ensure that resources are not “loved to death.” In some areas, at certain times of year, policies are required to establish limits and systems of allocated use, in order to accommodate public recreation while protecting and restoring assets. Fires and smoke add to the challenges of land and people management. Imposition of limits and allocations is rarely a popular policy decision, and the tourism industry needs to participate in these policy discussions to ensure the sustainability of both the resources and the tourism industry for the long term. Tourism businesses and marketing organizations can help protect resources by educating their customers about sustainable tourism values and low-impact visitation (leave no trace, respect for cultural sites/artifacts, pack in/pack out, use of fire pans and portable toilets, etc.), as well as local rules and regulations. By understanding and communicating the reasons behind the rules and regulations, tourism partners contribute to sustaining and protecting the resources of Montana.

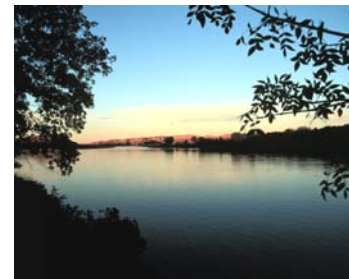
Examples of increased management activities to reduce impacts are the Blackfoot and upper Madison rivers, where Fish Wildlife & Parks and the BLM have established permits for competitive, commercial, and group uses as a means of monitoring high use levels and evaluating the need for additional controls, in collaboration with local law enforcement, adjacent landowners, and users, to achieve a balance of use and resource protection. The new bus system in Glacier National Park, which reduced traffic on Going-to-the-Sun Road by 20% in its first year of operation, is another action that reduced impacts.

POLICY ISSUE 3: Remaining competitive as a global tourism destination, and reversing Montana’s loss of market share among destination travelers.

ITRR research conducted in 2005 revealed that Montana lost market share from 2001 to 2005 among destination vacation travelers. In 2007, Montana ranked 31st among state tourism offices in total spending on tourism marketing.² The national average spending among state tourism offices is \$15.3 million (50 states reporting), compared with Montana’s \$9.8 million. Compounding declining global stature is the situation of under utilization in hotels and other tourism facilities: 70% of Montana’s nonresident travelers visit from April to September, and only 30% from October to March.

Statewide, Montana had more than 4.6 million vacant hotel room nights in 2006, primarily in November through April, based on a statewide year-round hotel occupancy rate of 59.5%.³ The 2006 average room rate was \$67.73 per night, so Montana had \$309 million worth of vacant hotel rooms, which if filled would have generated \$21.7 million in lodging tax revenue. In 2006, Montana was below the national occupancy rate of 64%, and significantly below the national average room rate of \$95.64. This situation of dramatic under-utilization of capacity creates instability in tourism industry revenues and jobs, and increases costs for supplies, labor, and facilities. Montana needs to regain competitiveness by improving its marketing reach, targeting niche markets to boost visitation among high value, low impact visitors, and addressing the issue of under-utilization in off-peak seasons.

Regional tourism organizations and Convention & Visitor Bureaus (CVBs) are key partners with Travel Montana in marketing the state. In most states, CVBs are funded



Top Attractions for Vacationers to Montana

1. Mountains and forests
2. Open space
3. Yellowstone National Park
4. Rivers
5. Glacier National Park
6. Lakes
7. Wildlife and Fish
8. Lewis & Clark Sites
9. History and Culture
10. Indian History and Culture

Source: ITRR 2001/2005
Nonresident Report

Top Sites Visited by Montana Travelers

1. Yellowstone National Park
2. Glacier National Park
3. Little Bighorn Battlefield
4. Flathead Lake State Park
5. Virginia City/Nevada City
6. Lewis & Clark Interpretive Center
7. Big Hole Battlefield
8. National Bison Range
9. Lolo Pass Interp. Center
10. Museum of the Rockies
11. Pompeys Pillar
12. Missouri Headwaters State Park

Source: ITRR 2001/2005
Nonresident Report

² Tourism Industry Association (TIA) 2006-2007 Survey of U.S. State and Territory Tourism Office Budgets

³ Smith Travel Research, 2006

Statewide, Montana had more than 4.6 million vacant hotel room nights in 2006, primarily in November through April.

by local sales and lodging taxes, and provide professional staff and marketing horsepower to generate thousands of bookings in areas with significant concentrations of hotel rooms, restaurants, meeting facilities, sports/event venues, and other visitor amenities. In many states, including Montana, regional tourism organizations are funded by state lodging taxes, and provide general marketing and promotion for large geographic areas, including urban and rural areas, although the majority of the lodging taxes are generated in the urban areas. The extremely large geographic areas covered by the six Montana regional organizations present challenges to effective marketing efforts. Montana needs to discuss and clarify the unique roles and priorities of the regions and CVBs, along with their challenges and opportunities, and determine how to build greater capacity within these organizations to increase their effectiveness. Regional boundaries and marketing efforts also should be reviewed in the context of the actual travel patterns of destination travelers.

POLICY ISSUE 4: Encouraging families and youth to spend more time enjoying outdoor recreation activities.



"At first it was like a mission of discovery...to follow the maps of images in our virtual world to find the REAL thing. Now, we just like being outside. It is so retro!"

- Geeksinthewoods.com
(GEEK: Gaming Environmentally
Educated Kid)

Tourism in Montana is highly dependent on outdoor recreation. However, national trends indicate declining interest among many population groups – most alarmingly children – in outdoor recreation (camping, fishing, hiking, etc.). Initiatives have begun around the country, including Montana, to address this issue of reconnecting youth with the outdoors. Montana's Governor serves as co-chair of a national task force focused on this topic and led by The Conservation Fund. Examples of current efforts in various states/cities include Take It Outside, No Child Left Inside, Kids in the Woods, Outdoor Education Initiative, Get Fit With Us, Healthy Kids-Healthy Forests, Move Missoula, etc. In some areas, outdoor activities for kids are coordinated with science, math and language programs related to state standards and education initiatives. However, transportation, fuel costs, programming, curriculum development, and the identification of appropriate activities often are barriers to such programs. In addition to state and federal agencies, other groups involved include university extension 4-H programs, Boys & Girls Clubs, Boy Scouts of America, conservation and sportsmen's organizations, civic service clubs, churches, outfitter camping programs, etc. To ensure future customers for its outdoor recreation-based tourism product, Montana should engage MTRI and tourism industry partners to coordinate dynamic youth-oriented efforts, and engage teens and younger children in the process.

POLICY ISSUE 5: Changing school/university calendars to accommodate student employment in the tourism/recreation industry.

Peak tourist season in Montana is July through September. However, university calendars are structured to end classes in May, and resume in August. Consequently, many tourism businesses and public agencies hire out-of-state or foreign workers for seasonal jobs, rather than employing Montanans, because they cannot afford to lose their workforce in the middle of peak season. Students can earn as much as \$4,000 between mid-August and mid-September in tourism, recreation, and fire-fighting jobs, a significant contribution toward tuition and reduction of student loan debt. Following the lead of other states, Montana should recognize the significant economic and social contribution of the tourism and recreation industry by adjusting its school and university calendars to allow students to work a full tourism/fire season, and to facilitate more hiring of Montanans for tourism and recreation jobs.

POLICY ISSUE 6: Maintaining and enhancing tourism and recreation-related facilities and infrastructure (roads, restrooms, visitor centers, historic sites, parks, trails, etc.).

Growth in nonresident visitation (and in Montana's population) means increased demand for public and private facilities and services, which requires capital investment and higher levels of maintenance and operations funding. Montana's marketing strategy is to target high value, low impact visitors such as geotourists, who respect natural and cultural resources. These visitors also expect high quality facilities and amenities, and they are willing to pay for them: investments in facility upgrades often result in significant increases in revenue-generating potential. Strategies to sustain the network of visitor centers, trails, museums, and other interpretive assets in Montana will help support the investments that have been made in these facilities. Policy makers, tourism industry representatives, and facility managers should continue to discuss options to address increasing facility needs driven by growing visitor demand.



39% of nonresident visitors to Montana participate in wildlife viewing; 10% engage in birding and nature study.

POLICY ISSUE 7: Developing and enhancing wildlife-related recreation activities (e.g., wildlife viewing, birding trails, etc.).

In Montana and nationally, non-consumptive wildlife-oriented recreation is a growing activity and a significant source of tourism visitation. However, most state wildlife management agencies derive the majority of their funding from hunting and fishing licenses, fees and tags. Demand is growing for other wildlife-related recreation opportunities, without commensurate funding to provide them. Agency managers and policy makers need to assess existing conditions, and identify opportunities to enhance wildlife programs for these emerging and under-served wildlife interests. It is important to maintain the current network of watchable wildlife sites and birding trails, and to consider the impact of land management decisions on maintaining and developing watchable wildlife opportunities. Moreover, new fee-based programs can improve wildlife recreation opportunities while simultaneously bolstering resource conservation by supporting efforts like conservation easements.



POLICY ISSUE 8: Providing areas for sustainable motorized and non-motorized recreation, and identifying trail systems and loop trails for use by both residents and visitors.

Baby boomers have become older, more affluent, and are realizing increasing limitations in their physical capabilities. As a result, many boomers – and more women – who enjoy hiking, backpacking, and cross-country skiing now also participate in motorized recreation activities like ATV and snowmobile touring. Montana and other states are experiencing higher levels of interest in multi-modal recreation, as well as conflicts between recreationists who prefer motorized and non-motorized means of conveyance. Agency planning efforts, such as the State Trails Conference Planning Committee and U.S. Forest Service Travel Planning, attempt to provide motorized recreational opportunities in ways that reduce conflicts between user groups, and minimize negative impacts to resources from both nonmotorized and motorized recreation. Responsible travel planning protects wildlife species that are vital to wildlife viewers and hunters, and helps maintain habitat and healthy ecosystems. Both motorized and nonmotorized groups seek to assist with travel management planning, public education about responsible use, and trail maintenance.

Other states have developed successful designated motorized and non-motorized trail systems that cross jurisdictional land boundaries (state, federal, county, private, tribal).

"The Montana Trail Vehicle Riders Association (MTVRA) represents 20 OHV (off-highway vehicle) clubs/associations around the state, promotes ethical and responsible use of Off Highway Vehicles (OHV) on public land, and has partnered with land management agencies on volunteer projects around the state. MTVRA appreciates the recognition of OHVs that the stakeholders have stated in the Plan. Our question at this point is how do we participate to help to create positive outcomes for the future? We have been active in pursuing legislation that could create opportunities for rural towns as well as private land owners."

- MTVRA Representative

"We know from other states that all-terrain vehicles (ATVs) used in hunting can create conflicts. In Montana, with more land base and fewer people, we can take steps now to head off some of the contentious situations other, more populated states, are running into."

- Bob Walker
FWP Trails Program Coordinator

In 2005, the U.S. Forest Service published a new rule regarding motor vehicle access to national forests and grasslands. The rule requires each national forest/grassland to designate roads, trails, and areas open to motor vehicle use. Motor Vehicle Use Maps (MVUM) were published in August 2007 for the Gallatin/Madison Range, Bridger/Crazy Range, and the Absaroka/Beartooth Range. Sustainable motorized recreation and trail maintenance will require ongoing partnerships with public, private, and tribal stakeholders.



"The management of natural resources has a direct impact on our cultural institution. The way they are maintained, conserved, and managed is a deciding factor in whether visitors come to our area. Everyone must work together to draw visitors to Montana."

- Survey Respondent

In Montana, a statewide proactive and strategic approach is needed to identify opportunities to foster communication and cooperation between land managers, property owners, and trail user groups. Partnerships should be developed to address the increasing demand by identifying and promoting trail systems and loop routes for recreational touring in appropriate areas.

POLICY ISSUE 9: Preventing introduction and spread of noxious weeds and other invasive species through partnerships and educational efforts.

Montana State University coordinates Montana's Statewide Noxious Weed Awareness and Education Campaign (www.weedawareness.org), a coalition of state, federal, private, tribal, and nonprofit entities. However, more education is needed to inform visitors and residents about prevention methods and control measures to eradicate weeds and other invasive species, which impact wildlife habitat and are introduced by visitors. Tourism businesses need to become more engaged in the battle, using a collaborative and pre-emptive approach that provides information to travelers *before* they arrive in Montana. Web sites, visitor guides, podcasts, and other outdoor recreation promotion efforts should include an invasive species awareness message in collaboration with the public and nonprofit sector partners. Opportunities for public-private partnerships should be explored, such as cost-sharing of tourism promotions with matching funds to include a weed awareness message. County noxious weed extension specialists should communicate with local and regional tourism groups to coordinate efforts.

POLICY ISSUE 10: Resolving conflicting state and federal agency regulations and policies related to tourism and recreation.

State and federal policies and regulations related to a single issue often differ significantly among various agencies, and in some cases, among different management units of the same agency. To the extent possible, the most cumbersome policy differences should be identified, based on input from user groups, and collaborative discussions held to resolve differences and conflicts. Additionally, there are opportunities to better serve visitors through value-added outdoor experiences provided by outfitters and other business partners. However, cumbersome and inconsistent permitting processes often hinder such opportunities, or make them economically unviable. Areas where permitting processes can be streamlined, and/or consistency improved across agency jurisdictions, should be identified and pursued. An example is the successful collaboration between Montana Fish, Wildlife & Parks and the Bureau of Land Management (BLM) to resolve policy differences in Missoula, and create a single permit for use of various agency facilities. Additionally, State and federal agencies should proactively respond to emerging consumer trends by working with tourism industry partners to develop Request For Proposals (RFP) for services like outfitted family camping/hiking/wildlife trips.